PFLAG

Chapter Hub Cheat Sheet

Table of Contents

LOG IN

- Go to pflag.org/chapterhub > Enter username and password > click login button
- Forgot your username? Email Brooke Smith(bsmith@pflag.org) or Angel Kearns (akearns@pflag.org) ?
- Forgot your password? Click the Forgot Your Password link or email Brooke Smith or Angel Kearns.
- Logging in for the first time? Email Brooke Smith (bsmith@pflag.org) for a welcome email.

OVERVIEW

Every chapter member has an Individual record with information specific to them - name, pronoun, gender identity, email, phone, and address. A household record is added automatically and this is how you will link two or more people who live together. Organization affiliation is the member's link to your chapter.
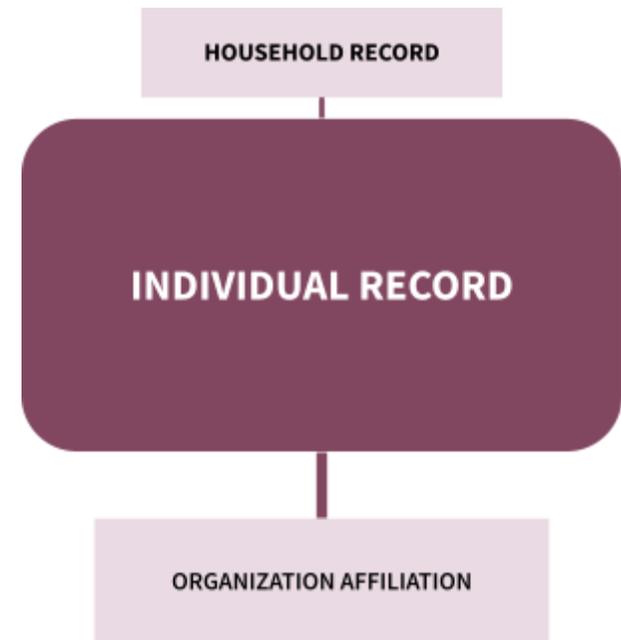
ADD A NEW CHAPTER MEMBER

There are two steps to this process; first add the person's contact info and second add their organization affiliation to your chapter.

A member with one person in the household	A member with 2 or more people in the household
Step 1	**Step 1**
● Click on Individuals tab	● Click on Individuals tab
● Click "New" button	● Click "New" button
● Choose Chapter Member as Record Type of New Record	● Choose Chapter Member as Record Type of New Record
● Click Continue	● Click Continue
● Enter First Name, Last Name, Phone, Email, Mailing Address	● Enter First Name, Last Name, Phone, Email, Mailing Address
● Leave Organization/Household Name blank (it will autofill when you save)	● Leave Organization/Household Name blank (it will autofill when you save)
● Leave Primary Affiliation blank	● Leave Primary Affiliation blank
● Click Save	● Click Save
Step 2	● Click on New in the Individual tab
● Scroll to Organizational Affiliations section	● Choose Chapter Member as Record Type of New Record
● Click New Organization Affiliation	● Click Continue
● Choose Membership as Record Type of New Record	● Enter First Name, Last Name, Phone, Email, Mailing Address
● Click Lookup Icon (looks like a magnifying glass)	● Click Lookup Icon next to the Organization/Household name
● Enter Chapter Name	● Enter name of the existing household member in the search field
● Click Go button	● Click Go!
● Click Chapter Name (ex. PFLAG Greensburg)	● Click on name of existing household member
● Choose Current in Status dropdown	● Leave Primary Affiliation blank
● Check Primary box	

● Save	● Click Save
	Step 2
	● Scroll to Organizational Affiliations section
	● Click New Organization Affiliation
	● Choose Membership as Record Type of New Record
	● Click Lookup Icon (looks like a magnifying glass)
	● Enter Chapter Name
	● Click Go button
	● Click Chapter Name (ex. PFLAG Greensburg)
	● Choose Current in Status dropdown
	● Check Primary box
	● Save

RENEW CHAPTER MEMBERS

- Click Organization Affiliations tab
- In list dropdown, choose My Chapter Membership All > click the Go button
- Find member's name in list
- Click "Edit"
- Change status to "Current"
- Click "Save"

UPDATE CHAPTER MEMBER CONTACT INFORMATION

- Go to Individuals tab
- Choose "My Chapter Individuals-All" in dropdown > click Go button
- Find Individual
- Click Edit
- Update relevant contact information
- Save

UPDATE BOARD MEMBERS

- Go to Organizations/Households tab
- View "PFLAG Chapter Boards" in dropdown
- Click Go button
- Click PFLAG <chapter name> Board
- Scroll to Affiliated Contacts
- Make a current board member a former board member (please do not delete former board members
  - Find board member
  - Click Edit
  - Choose Former in Status dropdown
  - Choose date
  - Save
- Add a new chapter board member
  - Note: the Individual should already be added (see information above on adding a new member)
  - On the Chapter Board record, Click New Organization Affiliation
  - Choose Board as Record Type of New Record

- Click Lookup Icon (looks like a magnifying glass)
- Enter Individual's Name
- Click Go button
- Click Individual's Name
- Choose Position in dropdown
- Enter Start Date
- Save

PAY CHAPTER DUES

- Go to Organizations/Household tab
- Click on your chapter record
- Click on "Pay Chapter Dues"
- Enter in the amount you're paying ($15 x number of households)
- Enter in your billing and credit card information
- Click the Process button to complete

UPDATE CHAPTER CONTACT INFORMATION

- Go to Organization/Household tab
- Find View "PFLAG Chapters" dropdown
- Click Go button
- Click your chapter name to open your chapter record
- Click Edit button
- Update your chapter contact information

- Update physical address. The address information that syncs to the map on the Find a Chapter section on pflag.org comes from these fields. If the information does not appear on a Google map, it will not appear correctly on the website and the search function will be skewed.
- Click Save (Note: your updates sync to the website within about 3 hours)

ADD CHAPTER MEETINGS AND EVENTS

- Click Campaigns tab
- Click New
- Enter fields applicable to your meeting or event
    - Campaign Name = name of meeting or event (required)
    - Description = brief description of your event (250 word limit)
    - Type of Meeting/Event = predetermined options to help you categorize your meeting or event
    - Start Date/Time = use this field to mark the beginning time
    - End Date/Time = use this field to mark the ending time (when the event it complete, the information will be automatically removed from the website)
    - Location = name of the location (for example, Springfield Downtown Library)
    - Address = street address (needed for Google maps to load correctly)
    - City = city (needed for Google maps to load correctly)
    - State = must be state abbreviation (needed for Google maps to load correctly)
    - Zip Code = zip code (needed for Google maps to load correctly)
    - Event Contact Name = best person to answer questions
    - Event Contact Email = corresponding email to contact name
    - Event Contact Phone = corresponding phone to contact name
- Save (Note: your meeting information will sync automatically to the website within 3 hours)